Monitoring and Evaluation Tools and Techniques

Surveys, registers, photos, videos, focus groups – these are just some of the tools you can use to gather evidence about your work. But knowing which tool to use when can sometimes feel overwhelming. And what exactly do you do with the information once you have collected it? This guide provides an overview of some of the tools and techniques you can consider using to evaluate the impact that your work is having and suggests when they might be appropriate to use. Where available, links to more detailed "how to" guides or templates are included.

Some pointers before you get started:

- Before thinking about what tools or techniques you want to use, make sure you are clear about what information it is that you need, how the evaluation tool you pick will help you get this information, and what you are going to do with it once you have it.
- Only gather information that you know will be useful to you - sometimes less is more! If you find that you are gathering information that you are not using, think about why this is and either change how you use the information, or stop gathering it.
- It can be easy to put evaluation on the back burner until there is some reason for us to do it (very often this can be reporting to a funder). Planning evaluation at the start of your programme, and then finding ways to build proportionate and consistent information gathering into your work can really improve the quality of the information you have, and can make it easier when it does come to reporting time
- Make sure to build time into your team meetings to see how your monitoring and evaluation is going, and to use the information you have to think about whether your programme is working the way that you expected

For more information on planning and carrying out your own monitoring and evaluation visit:

NPC https://impactsupport.org/
EVALUATION SUPPORT SCOTLAND http://www.evaluationsupportscotland.org.uk/
INSPIRING IMPACT https://inspiringimpact.org/
LEAPFROG http://leapfrog.tools/tools/

The ROBERTSON Trust

Monitoring Data

What is it?

Information which is collected routinely through registers and registration forms.

What form can this take?

- Registration forms – demographic data
- Registers – attendance at sessions

Uses

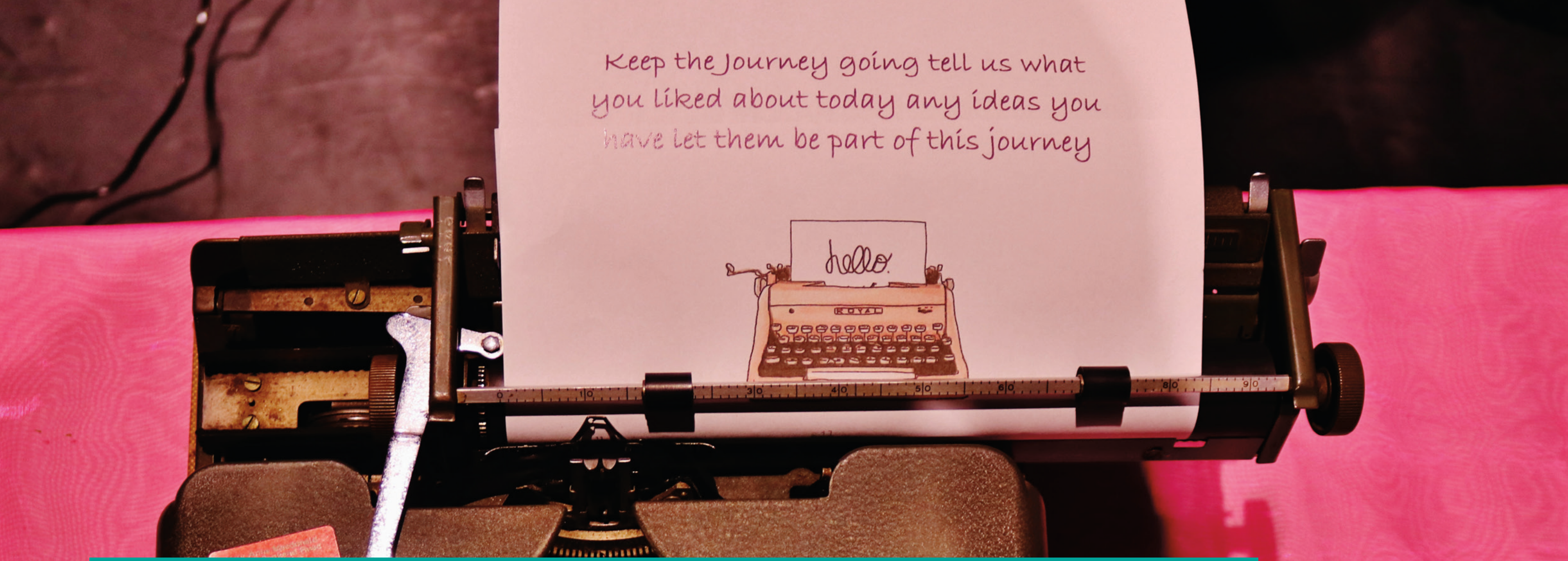
- Check participant numbers – are people turning up?
- Check attendance levels/retention rates – are people staying involved?
- Check demographics of participants and identify any gaps – are you working with your target audience?
- Check attendance across programmes - are some activities have more successful attendance rates or attract a certain participant type?
- Keep a record on individual participants to track their progress – what are they attending?
- To feedback to your, staff, board, participants, partners and funders – are we doing what we said we would do?

When to use it

Throughout the programme.

Who to use it with?

Potential Participants and target groups – to help shape understanding of their views	☐
Participants in one off or taster sessions	☑
Participants in short terms programmes up to 6 weeks	☑
Participants in programmes lasting 6 weeks or more	☑
Partners	☐
Staff	☐



Routine project records and information

What is it?

Information generated as your project progresses

What form can this take?

- documentation such as completion certificates or qualifications
- project risk registers which show how risks change over the course of your interventions
- e-mail comments or feedback from partners, participants or parents.
- minutes or notes from partner meetings evidence of press or online coverage of your activity
- copies of publicity material
- photographs taken during activities

Uses

- To provide a record of activity
- To evidence progress towards targets
- To Illustrates learning or progress
- To enrich your data and reporting

REMEMBER

If you are using information like this in a report or document it is really important to link the evidence back to the outcome it illustrates using key words. For example a picture of a certificate could be labelled 'Evidence of progress with education."

When to use it

Throughout the programme – reactively (i.e. the evidence is generated by you or a third party and you just record it – examples would be an unsolicited email from a partner praising your work or a press article or listing about your work, or an article in a local paper about your work)

Who to use it with?

This material is slightly different in that it can be captured reactively as the programme progresses, rather than you having to create a specific "evaluation tool" to generate information

Personal reflection and diaries

What is it?

Recorded comments on and by participants which can be used to capture observations and changes in behaviours and emotions being experienced as a result of a programme

What form can this take?

- Personal written diaries/notes kept by project leads and participants
- Video diaries
- Photo diaries
- Online blogs/galleries
- Story boards

Uses

- Allow participants (and workers/partners) to reflect on what works and what doesn't
- Look at the progress of a programme of work or an i individual over time
- Provide quotes and detail that will enhance any reporting
- Starting point for conversations about progress with participants, staff and partners
- Enable you to review and learn from your practice

When to use it

- Start of programme
- Throughout Programme
- At end of programme

Who to use it with?

Potential Participants and target groups – to help shape understanding of their views	☐
Participants in one off or taster sessions	☐
Participants in short terms programmes up to 6 weeks	☐
Participants in programmes lasting 6 weeks or more	☑
Partners	☑
Staff	☑

Questionnaires

What is it?

A popular method of consultation and evaluation as it can be a way of getting a large number of responses, from a range of stakeholders, around a particular issue or set of questions. Questionnaires are often the “go to” for organisations thinking about consulting and evaluating – but they are only one tool.

What form can this take?

- Written list of questions in paper or digital form
- Telephone questionnaire
- One off questions asked during programmes (see 1 minute tools)

Uses

- Build up a “body of evidence” about what participants and partners think
- Get answers to very specific questions and more general points
- Track progress of individuals and whole programmes of work over a period of time
- Feedback to your client group about what they think, and to show what you are doing as a result of their answers
- Review and learn from your practice

When to use it

- Programme planning stage
- Start of project
- Throughout Project
- At end of project

NB – written questionnaires are often not the best tool to use with participants who you are meeting for the first time, or with whom you don’t have an established relationship. Think about whether there are other ways to get the information you need.

Who to use it with?

Potential Participants and target groups – to help shape understanding of their views	☑
Participants in one off or taster sessions	☐
Participants in short terms programmes up to 6 weeks	☑
Participants in programmes lasting 6 weeks or more	☑
Partners	☑
Staff	☑

Interviews and focus groups

What is it?

Gathering important insights and feedback as quotes and narrative from participants, partners, community members, parents and funders can provide a wealth of important project feedback.

What form can this take?

- Feedback can be done face to face, by telephone or video call, and can be one to one or in small groups.
- Informal conversations – recorded via field notes or digital recorder / video
- Semi-structured interviews with key themes
- Focus Groups
- Peer-led interviews

Uses

- Enables you to build up a "body of evidence" about what participants and partners think
- Enables you to understand more about the story of the participant through their own descriptive account
- Enables you to illustrate links between activities and outcomes
- Enable you to review and learn from your practice
- Can be used to shape and improve delivery as well as provide strong evaluative evidence

When to use it

- Programme planning stage
- At end of project

REMEMBER
If you are using information like this in a report or document it is really important to link the evidence back to the outcome it illustrates using key words. For example a quote from a parent about how their child is more confident could be labelled 'Evidence of improved confidence."

Who to use it with?

Potential Participants and target groups – to help shape understanding of their views	☑
Participants in one off or taster sessions	☐
Participants in short terms programmes up to 6 weeks	☐
Participants in programmes lasting 6 weeks or more	☑
Partners	☑
Staff	☑

Visual techniques and technologies

What is it?

Photography can be a useful tool for collecting information on the day to day happenings. After these images have been collected they can be used to lead a discussion with participants or can themselves function as a source of data to be included in a report or case study. It is always important to tag and code the images against the outcome they are illustrating. Field notes can accompany visual techniques to allow for the rich description of the image.

A number of tools are available to facilitate the taking of field notes. Digital Cameras can be used to record experiences and photos saved onto a computer to be accessed at a later date; or a mobile phone camera can be used and images uploaded to Instagram with accompanying comments.

What form can this take?

- Instagram photo wall
- Photo diary
- Video diary/evidence
- Social media

Uses

- Visually engaging ways to get participants, and the potential audience for your learning involved
- Allows for participants to take the lead
- Less prescriptive than questionnaires

When to use it

- Start of project
- During project
- At end of project

Who to use it with?

- [ ] Potential Participants and target groups – to help shape understanding of their views
- [x] **Participants in one off or taster sessions**
- [x] **Participants in short terms programmes up to 6 weeks**
- [x] **Participants in programmes lasting 6 weeks or more**
- [ ] Partners
- [ ] Staff

One-minute feedback tools

What is it?

'One-minute tools' provide a way for data to be quickly collected when needed without extensive set up or without the need for prior planning. These tools can be used in between sessions or at the end of a session, allowing the delivery lead to record simple data quickly.

The tools are often presented as a form of game (particularly with young people), encouraging uptake and allowing them to be positioned alongside other activities. These tools are appropriate for sessions where more in-depth feedback such as a questionnaire may not be appropriate or they can be useful when you have larger groups who you have not built up a great in-depth knowledge of.

What form can this take?

"In session" techniques that can quickly be done whilst you have participants in the room.

Uses

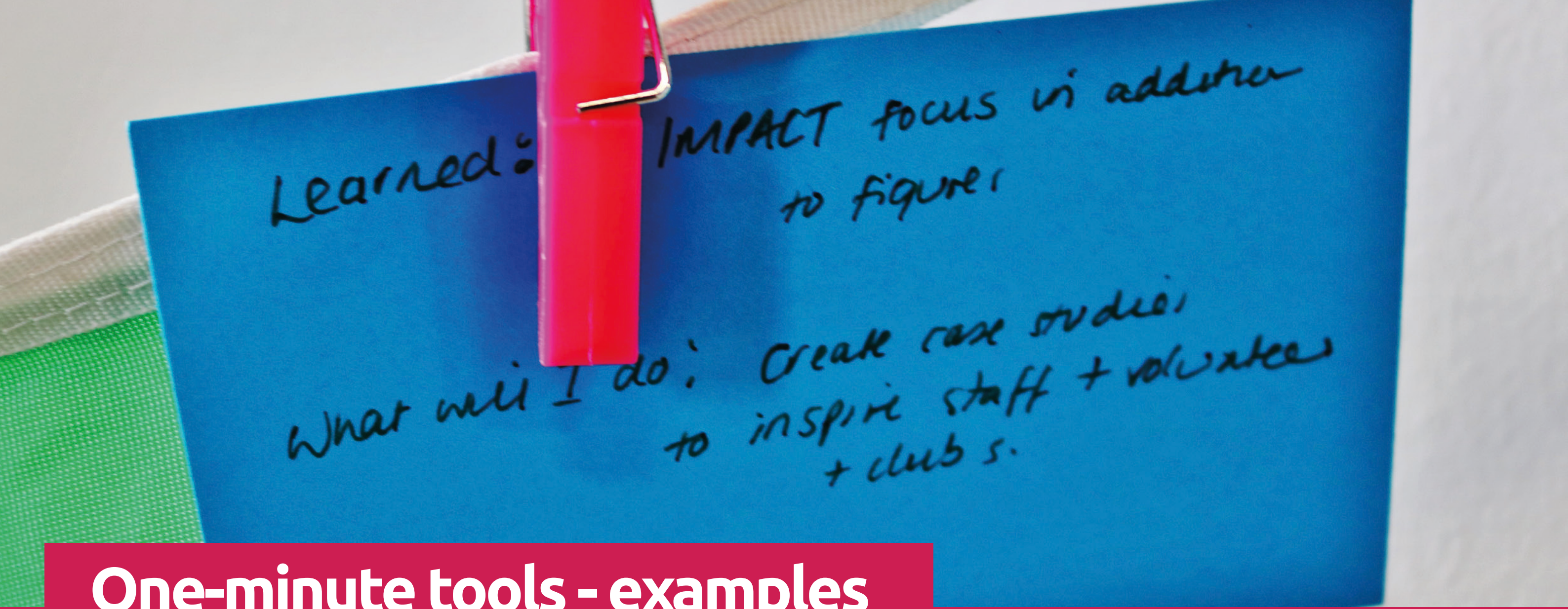
Quick, snappy, focused way to get specific feedback from participants on single items

When to use it

- During sessions
- At the end of sessions

Who to use it with?

Potential Participants and target groups – to help shape understanding of their views	☑
Participants in one off or taster sessions	☑
Participants in short terms programmes up to 6 weeks	☑
Participants in programmes lasting 6 weeks or more	☑
Partners	☐
Staff	☐



One-minute tools - examples

Rating Game
A line is drawn on the floor, representing a gradient from one response to another (e.g. positive to negative). Participants are asked a question and will be asked to position themselves on the line depending where they agree. E.g.: How much did you enjoy activity X? This can be photographed for future use.

Target Game
Two targets are placed on the floor to the far right and left of the room. These targets represent are given contrasting positions to represent (e.g. yes/no or good/band) and participants are asked to respond by running to the appropriate target. Follow up: individuals could be asked why they chose the particular target they did.

Four Faces
Four faces are placed in opposing corners (e.g. Happy, Sad, Confused, and Angry) and participants are asked to respond to prompts by running to the face that best correlates to their position in response. This game could also function as a warm up activity. Example prompt: How do you feel about school?

Traffic Light Game
A set of red/amber/green traffic lights are drawn onto a piece of paper and hung on the wall. A question or statement is posed underneath the lights and each colour is assigned a value e.g. "not at all, a bit, a lot". Participants are provided with stickers and asked to place their sticker in the traffic light colour that most closely reflects their response to the question or statement.

Stones In A Pond
This activity requires some set up to create the imaginary space. Participants need to imagine themselves in a wood with a pond in the middle. They are asked to write on a piece of paper what they will take home from their experiences today, make it into a ball and 'toss it into the pond'. They can share what they wrote with the group if they'd like, or they can keep it secret. These notes can function as a collection of anonymous responses and feedback and may open up discussion amongst the group.

Post It Wall
3-4 questions are written up on separate large pieces of paper on a wall. Participants are given post it notes and are asked to write responses to each of the questions and place their post it note under the relevant question.

Visit Inspiring impact and ESS for more examples

Half-hour feedback tools

What is it?

These half hour activities are useful to use with groups of participants who you have a good level of trust with and who have been attending your sessions for over six weeks on a regular basis. These are interactive workshops which can provide rich feedback from the participant on their own enjoyment; wellbeing; confidence and many other personal journey stories. Some activities can be done in groups, other are more suited to 1:2:1 sessions with participants.

What form can this take?

- **Blob tree** - https://www.blobtree.com/
- **Relationship mapping** - http://www.evaluationsupportscotland.org.uk/resources/362/
- **Evaluation Wheel** - http://www.evaluationsupportscotland.org.uk/media/uploads/resources/pdf_method_-_evaluation_wheel.pdf
- **Choosing pictures** - http://www.evaluationsupportscotland.org.uk/resources/356/

Uses

- To gain a deeper understanding of certain issues
- To understand progress or change that has happened for programme participants

When to use it

- During sessions
- In specially set up review sessions with participants

Who to use it with?

Potential Participants and target groups – to help shape understanding of their views	☑
Participants in one off or taster sessions	☐
Participants in short terms programmes up to 6 weeks	☐
Participants in programmes lasting 6 weeks or more	☐
Partners	☐
Staff	☐

This content was orginally produced by Substance as part of its evaluation of Youth Work in Sport, a partnership programme between The Robertson Trust, The Rank Foundation, YMCA George Williams College and 13 community sports organisation based in Scotland.